

IMPERIAL VALLEY ECONOMIC DEVELOPMENT CORPORATION

INVESTOR HANDBOOK

Over Twenty Years of Economic Development



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October 1, 2024

Dear Investor,

On behalf of the Imperial Valley Economic Development Corporation (IVEDC), I would like to welcome you to our organization and thank you for your support.

As a new investor, we would like to profile your company in an upcoming e-newsletter and quarterly report. Please send a logo and a short company description to carlos@ivedc.com.

The past few years have been very exciting for IVEDC. Because of the generous support of investors like you, we have been able to surpass our goals, expand the size of our organization and increase our marketing efforts regionally, nationally and internationally. Your support will help IVEDC attend more industry-related trade shows and conferences and provide more familiarization tours of Imperial Valley.

We look forward working with you in the joint effort to promote the Imperial Valley region for new business, industry, and most importantly, bring new jobs to the Imperial Valley.

Should you have any questions about the organization, please contact me directly at (760) 353-8332 or email tim@ivedc.com

Respectfully,

Timothy E. Kelley
President/CEO
Imperial Valley Economic Development Corporation

BOARD OF DIRECTORS

EXECUTIVE OFFICERS

Jason Jackson
Chair
Southwest Security

Thomas Topuzes
Secretary/Treasury
Thomas Topuzes & Associates, LLC

Tom DuBose
Executive Committee
DuBose Design Group

Efrain Silva
Vice Chair
Imperial Valley College

Doug Dahm
Immediate Past Chair
The Dahm Team Real Estate

Stephen Benson
Executive Committee
Benson Farms

Nick Wells
Treasurer
City of Holtville

Timothy Kelley
President/CEO
IVEDC

Deborah McGarrey
Executive Committee
SoCalGas

MEMBERS

Bari Bean
Berkshire Hathaway Energy

Tyler Salcido
City of Brawley

Karl Weir
Las Chabelas Restaurant

Carroll Buckley
KXO Radio

Buz Schott
Con Edison

Robby Herrera
Keystone HR

Mike Morris
El Centro Motors

Mike Goodsell
City of Holtville

Robert Rubio
Imperial Printers

Patrick Carey
Sun Community Federal
Credit Union

Rod Colwell
Controlled Thermal Resources

Vince Signorotti
EnergySource

Bryan Keegan
Ventura Transfer Company

STAFF

Timothy E. Kelley
President/CEO
tim@ivedc.com

Alessandra Muse
Marketing/Communications Director
alessandra@ivedc.com

Alma Silva
IVBRC Director
alma@ivbrc.org

Sean Wilcock
VP of Business Development
sean@ivedc.com

Chad Sempstrott
Investor Relations
chad@ivedc.com

Jamie Robles
Program Assistant
admin@ivedc.com

CONTACT INFORMATION

Office 2415 Imperial Business Park Dr., Suite A
Imperial, CA 92251

Phone (760) 353-8332

Mailing PO Box 3005
El Centro, CA 92243

Website www.ivedc.com

ABOUT US

Imperial Valley Economic Development Corporation is a partnership of private enterprise and local government that is united by the common vision to expand and diversify our economy. Our investors include a host of public and private organizations that benefit from the growth of our regional economy.

MISSION

IVEDC's mission is to help grow the regional economy by aggressively marketing the region to attract business.

CORE VALUES

- Commitment to enhance the quality of life experienced in Imperial Valley by engaging in initiatives that contribute to the diversification of the regional economy
- Dedication to a Regional Economic Development Approach
- Partnership between the private and public sectors, which will always be driven by private sector forces

ECONOMIC DEVELOPMENT STRATEGY

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS)

Imperial Valley Economic Development Corporation partnered with local government, the private sector and other nonprofit organizations to develop a Comprehensive Economic Development Strategy (CEDS) for Imperial County. The strategy includes a survey of local assets and opportunities, initiatives, industries, economic development goals and an action plan to meet those goals.

Imperial Valley Economic Development Corporation plays an important role in the implementation of this strategy, but equally important is the role of partnering organizations, local government and stakeholders who work together to achieve this vision of economic prosperity.

B.E.A.R.

IVEDC helps to grow the regional economy by focusing on three areas of impact for local industry and business:

- 1) Expansion
- 2) Attraction
- 3) Retention

This is also known as the B.E.A.R. method.

TRIPLE BOTTOM LINE

IVEDC is committed to the Triple Bottom Line, a shared approach to economic development in California. This approach has three pillars of measuring impact:

- 1) Economy
- 2) Environment
- 3) Equity

INVESTOR LEVELS AND BENEFITS

At Imperial Valley Economic Development Corporation, we are committed to ensuring our investors see a return on investment. We understand that every business has unique needs and priorities. The investment benefits listed below are a foundation of the services we provide and we welcome other opportunities to serve the needs of our investors.

BENEFITS	BRONZE \$1,000	SILVER \$2,500	GOLD \$5,000	PLATINUM \$10,000	DIAMOND \$25,000
Investment in the Imperial Valley	✓	✓	✓	✓	✓
Listing on IVEDC website	✓	✓	✓	✓	✓
Announcement in e-newsletter	✓	✓	✓	✓	✓
B2B & marketing opportunities	✓	✓	✓	✓	✓
Access to tradeshows, grand openings & groundbreakings	✓	✓	✓	✓	✓
Invitation to IVEDC hosted events	✓	✓	✓	✓	✓
Access to workforce development services	✓	✓	✓	✓	✓
Opportunity to serve on Board of Directors & committees	✓	✓	✓	✓	✓
Invitation to IVEDC retirement program, MEAP	✓	✓	✓	✓	✓
Registration to Imperial Valley Business Resource Center	✓	✓	✓	✓	✓
Access to incoming leads, contracting & bid opportunities	✓	✓	✓	✓	✓
Annual business assessment*		✓	✓	✓	✓
Workforce needs assessments*		✓	✓	✓	✓
Advertising of employment opportunities by IVEDC*		✓	✓	✓	✓
Opportunity to market events on IVEDC website*		✓	✓	✓	✓
Complimentary advertising on IVEDC e-newsletter*		✓	✓	✓	✓
Use of IVEDC facilities for private meetings*		✓	✓	✓	✓
Early access to procurement opportunities & leads			✓	✓	✓
Identification badges at IVEDC events			✓	✓	✓
Distinctive recognition at IVEDC events			✓	✓	✓
Recognition at IVEDC Annual Dinner			✓	✓	✓
Logo listing on IVEDC website			✓	✓	✓
Opportunity to present at Roundtable meetings			✓	✓	✓
Opportunity to serve on Roundtable steering committee				✓	✓
Access to IVEDC data resources & reports				✓	✓
Dedicated email blast by IVEDC*				✓	✓
Complimentary exhibitor table at IVEDC events				✓	✓
Complimentary dinner table at IVEDC Annual Dinner					✓
Recognition at all IVEDC Events					✓
Special listing on IVEDC website					✓
Opportunity for negotiated benefits*					✓

*Upon Request

INVESTOR INFORMATION

1. _____
 DATE INDUSTRY (REFER TO LIST BELOW)

 ORGANIZATION NAME YEAR ESTABLISHED # OF EMPLOYEES

 MAIN CONTACT TITLE

 STREET ADDRESS CITY/STATE/ZIP

 OFFICE PHONE/EXT. EMAIL ADDRESS WEBSITE

- | | | | | | |
|---------------|--------------|-------------|-------------------|----------------------|------------------------|
| Accounting | Commercial | Education | Financial Service | Land Dev. | Real Estate |
| Advertising | Construction | Employment | Government | Legal Service | Title Company |
| Banking | Consulting | Energy/Bio | Industrial | Professional Service | Utility |
| Business Dev. | Design | Engineering | Insurance | Public Relations | Other (Please specify) |

2. _____
 ADDITIONAL CONTACT (REQUIRED) TITLE

 STREET ADDRESS CITY/STATE/ZIP

 OFFICE PHONE/EXT. EMAIL ADDRESS

3. _____
 ADDITIONAL CONTACT (REQUIRED) TITLE

 STREET ADDRESS CITY/STATE/ZIP

 OFFICE PHONE/EXT. EMAIL ADDRESS

INVESTMENT

DIAMOND \$25,000

PLATINUM \$10,000

GOLD \$5,000

SILVER \$2,500

BRONZE \$1,000

FOR IVEDC USE ONLY:

INVESTMENT RENEWAL MONTH: _____ FISCAL QUARTER: _____

Please complete the following form and return to IVEDC.

ROLES AND RESPONSIBILITIES

As an IVEDC Investor, you have become part of a private/public partnership to grow the economy of Imperial Valley. Over the next five to ten years, the region will experience a renaissance of growth in the residential, retail and industrial sectors. In an effort to foster this growth and ensure that all Imperial Valley entities (both public and private) have the opportunity to directly benefit from new investments, IVEDC has worked to create the following “Roles and Responsibilities” memorandum.

The Board of Directors has embraced the following motto regarding our region’s cooperative partnership: “Recruit Regionally, Compete Locally.” Essentially, this is the understanding that we must work together to grow the market size while fairly competing to increase our personal market share.

JOINT PLEDGE

IVEDC pledges the following:

- IVEDC will provide the benefits associated with the agreed upon investment level to each investor. As agreed upon, investors will contribute our annual investment in a timely manner so those funds may be leveraged to promote our region as a business destination.
- As a trusted partner, IVEDC shall provide an ongoing accounting of all funding provided.
- IVEDC will hold quarterly meetings and one annual meeting of all IVEDC investors to present items of discussion regarding the organization and the region's economy. Investors shall stay engaged and attend meetings to receive information about our economy and interact with other investors to foster cooperation within the region. Each investor shall be given equal opportunity to serve on one or more IVEDC committees and (in accordance with our bylaws) as a member of the IVEDC Executive Committee.
- Qualified leads shall be distributed in accordance with IVEDC's lead protocol and shall be distributed to all investors within 24 hours of receipt. Investors shall respond to lead information requests of IVEDC staff. Many times, leads can benefit local businesses and public agencies.

COMMUNICATION PLAN

IVEDC's Communication Plan provides policy guidance for IVEDC staff, Board and investors regarding communication with investors, clients, media and public. Forms of communication include email, website, social media, phone conversations, personal/committee meetings and media outlets. We will communicate lead opportunities, meeting announcements and general communications via various methods of these forms of communication. The Communication Plan will be made available upon request.

LEAD PROTOCOL

IVEDC's Lead Protocol serves as the policy document for which all leads processed by IVEDC are handled. This policy includes the process for client intake, confidentiality, investor communications, and site visits. IVEDC leads include businesses with location and information needs. It is the responsibility of investors to respond to leads. Many times, leads will require information on specific sites and business referrals that allow for use of local goods and services, thus benefiting local businesses and public agencies. The Lead Protocol will be made available upon request.

ROLES AND RESPONSIBILITIES PLEDGE

I have read and understand the “Roles & Responsibilities” (on page 8 of the Investor Handbook) of becoming an IVEDC investor, and enter into this pledge on this _____ day of _____, 20 _____.

INVESTOR SIGNATURE

IVEDC CHAIR SIGNATURE

IVEDC PRESIDENT/CEO SIGNATURE

Please complete the following form and return to IVEDC.